Inventory Management and Tracking System

Countermeasure Tracking Systems (CTS)

Inventory Management and Tracking System (IMATS)

Evaluation - Getting Started

Version 7.0

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1   INTRODUCTION

The Centers for Disease Control and Prevention (CDC) Countermeasure Tracking Systems (CTS) Inventory Management and Tracking System (IMATS) provides state and local public health providers with a tool to track medical and non-medical countermeasure inventory and supplies during daily operations or an event. The system includes functions such as receipts, put away, and shipping. These functions allow users to enter detailed information about assets such as total number received, lot number, expiration date and storage location.

IMATS is deployed on the CDC network. CDC requires a level of security to ensure the protection of private and/or sensitive information from unauthorized disclosure, loss, or damage. The CDC Secure Access Management Services (SAMS) is an access management system that is designed to authenticate users and allow access to applications for which access rights have been granted. SAMS is the next generation replacement for CDC's legacy Secure Data Network (SDN) portal and does not require the use of digital certificates. SAMS will function as the access gateway to IMATS as well as the other Countermeasure Tracking System programs.

This document is intended to help administrators configure IMATS for use in their planning jurisdictions. There are two standard roles in IMATS—the public health administrator (PHA) and the facility administrator. The PHA role will be granted to users with high-level management or oversight responsibilities for a project area (one of CDC's 62 Public Health Emergency Preparedness Cooperative Agreement grantees, which include 50 states, four directly funded localities, three U.S. territories, and five freely associated states).

The facility administrator is an individual who manages one or more facilities. This role is granted to administrators who do not fit in the PHA role and may be used for local or regional managers. This document provides separate sections to explain the capabilities for each type of user.

2   USEFUL TIPS

- Online help documentation is available by selecting the "?" icon at the top right corner of the page.

- Use the Back button, when available, to return to the previous page.

- Use the Next button, when available, to continue to the next page.

- Use the Add button to save a new item.

- Use the Done button to exit the add functionality.

- Data fields marked with a red asterisk (*) are required. You will not be able to proceed until these fields are populated.

- IMATS contains two standard roles—PHA and facility administrator. Additional roles may be added using the Custom Roles process located under the Setup menu.

- The Products sub-menu found under Setup is used to configure product information such as name, manufacturer, and National Drug Code (NDC)/stock number. Information regarding actual inventory is added using the Inventory Management menu.

- To view the current inventory in a facility, use the Inventory Management->Inventory->Search Inventory function. This is where a user will have the opportunity to make manual adjustments if permission has been granted. Steps for these processes can be found in the online help documentation.

- There may be minor differences between the version of IMATS you evaluate and the production version. These differences should not affect your evaluation.

- Appendix A – Setup Options provides several alternatives for configuring IMATS.

Please note: The IMATS evaluation is provided to potential users for testing purposes only.

Do not use actual facility locations or "live" data during this trial period.

All user-generated data will be removed upon conclusion of the evaluation period.

In the evaluation environment, all users are set up as state-level personnel and may have more privileges than they will have in the production environment. This scenario allows evaluators to delete and modify users, orders, receipts, etc., that have been added by other users. We ask that evaluators who want to test the delete, edit, and inactivate functions in IMATS only test these functions on items that they have created.

If you encounter any problems while evaluating the system, please email ctshelp@cdc.gov with details about the issue including the specific steps you performed that resulted in the problem.

3   GETTING STARTED – PUBLIC HEALTH ADMINISTRATOR (PHA)

Prior to using IMATS, a PHA may add facilities within the PHA's project area. Once this is complete, custom roles and users can be added at the project area level or the facility level. PHAs have access to all facilities and inventory data within their project area; however, it is unlikely that they will do any processing at the facility level. The PHA role is meant for a high-level state administrator who has management or oversight responsibilities.

3.1   MENU OPTIONS

Bold items are described in the following sections.

Inventory Management	Reports	Data Exchange	Setup
• Requests – Search, Add	• Count Inventory Report	• Search Requests	• **Facility** – Search Facilities, **Add Facility**, Search Storage Locations, Add Storage Location, Add Range of Locations
• Purchase Order – Search, Add	• Audit Trail Report	• Search Reports	• Import
• Receive – Search, Add		• View Logs	• Export
• Put Away			• Product – Search, Add, Assign Unit of Measure
• Pick – Search, Add			• Supplier – Search, Add
• Back Order – Search, Add			• Unit of Measure – Search, Add
• Shipment			• **Users** – Search, **Add**
• Push Package			• **Custom Roles** – Search, **Add**
• Inventory - Search Inventory, Add Inventory Item, Move Inventory, Transfer Inventory			• Funding Source – Search, Add

3.2   FACILITIES

3.2.1   Add Facilities

Create facilities in your project area.

To add a facility:

- On the **Setup** menu, click **Facility**, and then **Add Facility**.

- Under **New Facility**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the facility belongs
Region	No	Region within the project area where the facility is located
Facility Name	Yes	Name of the facility
Status	Yes	Status of the facility • **Active:** Supplies **can** be shipped to this facility • **Inactive:** Supplies **cannot** be shipped to this facility
Type of Distribution Site	Yes	Designates the type of distribution site.
RSS Site Priority	Conditional	Required only if Type of Distribution Site is State RSS.
Facility Type	Yes	Type of facility (for example, a hospital or local health department)
Facility Type, Other	Conditional	Required only if Facility Type is Other
POD, Closed Type	Conditional	Required only if Facility Type is POD, Closed
POD, Closed Type Other	Conditional	Required only if POD, Closed Type is Other.
Notes	No	Any text that you feel would be helpful to include

- Under **Ship to Address**, enter the following information:

Field	Required?	Description
Address Line 1	Conditional*	Facility's street address
Address Line 2	No	Continuation of the street address, if needed
Longitude	Conditional*	Facility's longitude
Latitude	Conditional*	Facility's latitude
City	Yes	City where the facility is located
State	Yes	State where the facility is located
Zip Code	Yes	Facility's zip code
County	No	County where the facility is located

*The street address **or** longitude/latitude must be entered.

- Under **Receiving Capabilities**, enter the following information:

Field	Required?	Description
Loading Dock(s) Available	No	Select if the facility has one or more loading docks
Number of Loading Docks	Yes: If you selected the **Loading Dock(s) Available** check box	Number of loading docks in the facility
Accommodate 53-foot Trailer	No	Select if the facility can accommodate a 53-foot trailer
Maximum Truck Size	No	Maximum truck size the facility can accommodate
Fork Lift Available	No	Select if the facility has a fork lift that can be used
Lift Gate Available	No	Select if the facility has a lift gate that can be used

3.3   CONFIGURE USERS FOR PHA ROLE

Prior to the use of IMATS for inventory management, system administrators must create the necessary roles and users for the system. There are two standard roles in IMATS: the PHA and the facility administrator. Roles needed within a project area or facility need to be created locally.

3.3.1 Custom Roles

Create necessary roles for your project area and/or facilities. For example, a custom role named "Pick Team" may be created with permissions to the pick and ship functions only.

To add a custom role:

- On the **Setup** menu, click **Custom Role**, and then **Add Custom Role**.

- Under **New Custom Role**, enter the following information:

Field	Required?	Description
Role Type	Yes	Designates the level the role is assigned to (facility level, for example)
Role Name	Yes	Name of the custom role
Description	No	Any text that you feel would be helpful in describing the role

- Click the **Next** button to add the permissions.

To assign permissions to the role:

- Under **New Custom Role Permissions**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area the role is assigned to
Facility	Yes	Facility or facilities within the project area the role is assigned to

- Under **Permissions**, select the check box next to each permission you want to assign. To select/deselect all permissions, select the **Select/Deselect all** check box.

  NOTE: You must select at least one permission.

- When you are done, click the **Add** button. The system saves the information you entered, displays the previous page, and displays the role on the right side of the page.

3.3.2 Add Users

Add users to your project area and/or facilities.

To enter the basic information:

- On the **Setup** menu, click **User**, and then **Add User**.
- Under **New User**, enter the following information:

Field	Required?	Description
Title	No	User's title (for example, Mr. ,Ms., Mrs., Dr.)
First Name	Yes	User's first name
Middle Name	No	User's middle name
Last Name	Yes	User's last name
Suffix	No	User's name suffix (for example, Jr., Sr., MD, RN)

- Under **User Role**, enter the following information:

Field	Required?	Description
Role	Yes	User's role when using IMATS
Project Area	Yes	Project area the user roles and the user are assigned to

- Under **Address**, enter the following information about the user's home or work location:

Field	Required?	Description
Address Line 1	No	Street address
Address Line 2	No	Continuation line for street address, if needed
City	No	City
State	No	State
County	No	County
Zip Code	No	Zip code

- Under **Contact**, enter the following information:

Field	Required?	Description
Telephone	Yes	User's phone number
Ext	No	Extension of the user's phone number
Secondary Telephone	No	User's second phone number, if available
Ext	No	Extension of the user's second phone number
Email Address	Yes	User's email address, used as Username
Password	Yes	User's password for IMATS

- Click the **Next** button.

To assign a facility to the user:

- In the **Facility** list, select the check box next to each facility you want to assign. To select/deselect all facilities, select the **Select/Deselect all** check box.
- Click the **Next** button.

To assign permissions to the user:

- In the **Available Permissions** list, all permissions are selected. Deselect the check box next to each permission you do not want to assign to the user. To select/deselect all permissions, select the **Select/Deselect all** check box.

  NOTE: You must select at least one permission.

- Click the **Done** button. The system saves the information you entered, displays the previous page, and displays the user on the right side of the page.

4 GETTING STARTED – FACILITY ADMINISTRATOR

Prior to the use of IMATS for inventory management, custom roles and users must be added to the system. Once this is complete, local data can be imported for a facility.

4.1 MENU OPTIONS

Bold items are described in the following sections.

Inventory Management	Reports	Setup
• **Requests** – Search, **Add**	• Count Inventory Report	• **Facility** – Search Facilities, **Add Facility**, Search Storage Locations, Add Storage Location, Add Range of Locations
• Purchase Order – Search, Add	• Audit Trail Report	• **Import**
• Receive – Search, Add		• **Export**
• Put Away		• **Product** – Search, **Add**, Assign Unit of Measure
• **Pick** – Search, Add, **Search Requests (create pick list)**		• **Supplier** – Search, **Add**
• Back Order – Search, Add		• Unit of Measure – Search, Add
• Shipment		• **Users** – Search, **Add**
• Push Package		• **Custom Roles** – Search, **Add**
• **Inventory** - Search Inventory, **Add Inventory Item**, Move Inventory, Transfer Inventory		• Funding Source – Search, Add

4.2   CONFIGURE USERS FOR FACILITY ADMINISTRATOR ROLE

Prior to the use of IMATS for inventory management, system administrators must create the necessary roles and users for the system. There are two standard roles in IMATS: the PHA and the facility administrator. Roles needed within a project area or facility need to be created locally. If an administrator chooses to not use the import function, local data may be added using the corresponding process in IMATS.

4.2.1 Custom Roles

See Section 3.3.1 for details.

4.2.2 Add Users

See Section 3.3.2 for details.

4.3   IMPORT LOCAL DATA

The Import feature provided in IMATS allows users to upload data from their existing inventory management system(s). The local data will have to be translated into the proper format(s) as described below. Users may choose to use the import feature or manually input their data as described in Section 4.4.

The import function appends new records into the database and is not intended to be used to update current inventory data.

For a successful data import into IMATS, be sure to import in the following order:

1. Facilities
2. Storage Locations
3. Users
4. Suppliers
5. Products
6. Units of Measure
7. Inventory

NOTE: Import templates are available, please contact ctshelp@cdc.gov.

- At the top of the page, click **Setup**, and then **Import**.

- Under **Import Data**, enter the following information:

Field	Required?	Description
File	Yes	Name of the file containing the data you want to import Do one of the following: • Enter a filename • Click the **Browse** button to select the file
Import Data File Type	Yes	File type you want to import File formats are listed in the following sections
Project Area	Conditional (Depends upon your user role)	Project area the users belong to
Facility	Conditional (Depends upon your user role)	Facility within the project area where material/user is located

• Click the **Preview** button. The file displays so that you can make sure it is the one you want to import.

   o The import files should not contain a column heading row. If using the import templates provided by CTS Help, export the data to a tab delimited text file, open the text file, delete the first row and save the file.

• Is the correct file displayed?

   o If **Yes**, continue to the next step.

      ▪ For Import Users

         • Click the **Next** button, and continue to assign permissions.

         • In the **Available Permissions** list, all permissions are selected. De-select the check box next to each permission you do not want to assign to the users. To select/deselect all permissions, select the **Select/Deselect all** check box.

         NOTE: You must select at least one permission.

- Click the **Import** button. A confirmation message displays stating that the file will be loaded into IMATS.

- Click the **OK** button. The system imports the file from your computer and processes it so that the users can log in and use IMATS.

  o If **No**, click the **Back** button, and repeat the previous two steps.

- Click the **Import** button. A confirmation message will display stating that the file will be loaded into IMATS for the selected facility.

- Click the **OK** button. The system imports the file from your computer and processes it so that you can view the items.

  o If the file is not formatted properly the issues will be flagged with the icon, ⬤. Fix any data issues and import the file.

4.3.1 Import Storage Locations – File Format

The location data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Location Name	Unique name for the inventory storage location	Yes	Alphanumeric	100
Status	Status of the location Valid values are Available, Blocked, Inactive, and Full	Yes	Alphanumeric	20
Receipts Only	If the storage location is in the receiving area this field should be "Yes".	No	Yes/No	1
Receipts Only	If the storage location is in the receiving area this field should be "Yes".	No	Yes/No	1
Location Type	Type of location Valid values include: • Cold Chain Freezer • Cold Storage • Damaged • DEA Controlled • Dry Storage • Hazardous • Other • Pallet • Push Package Container • Quarantine • Temperature Controlled	Yes	Alphanumeric	70
Location Other	If Location Type "Other" is selected this field is required	Conditional	Alphanumeric	50
Maximum	Maximum storage capacity	No	Integer	15

Field	Description	Required?	Data Type	Length
Capacity	of the location			
Square Footage	Storage location size in square feet	No	Decimal	7, 2 (i.e., 50000.25)
Notes	User notes on the storage location	No	Alphanumeric	255

4.3.2 Import Supplier Data – File Format

The supplier data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Supplier name	Name of the supplier	Yes	Alphanumeric	120
Status	Status of the supplier The possible valid values are 'Active' and 'inactive'	Yes	Alphanumeric	70
Supplier Type	Type of supplier Valid values include: • Manufacturer • Distributor • Retailer • Federal Government • DSNS • Local Government • State Government	Yes	Alphanumeric	70
Notes	User notes on the supplier	No	Alphanumeric	255
Address Line 1	Address of supplier	No	Alphanumeric	100
Address Line	Continuation of address if	No	Alphanumeric	100

Field	Description	Required?	Data Type	Length
2	needed			
City	City	No	Alphanumeric	80
State	State	No	Alphanumeric	4
Zip Code	Zip Code	No	Numeric	20
County	County	No	Alphanumeric	8
Contact Person	Name of the contact person for the supplier	Yes	Alphanumeric	100
Title	Title of the contact person	No	Alphanumeric	40
Phone Number	Contact phone number for the contact	Yes	Numeric	20
Phone Extension	Phone extension (if applicable) for the contact	No	Numeric	6
Fax	Fax number for the contact	No	Alphanumeric	20
E-mail	E-mail address for the contact	No	Alphanumeric	80

4.3.3 Import Products – File Format

This is product configuration data for products that may be stored in the warehouse. This product information does not pertain to the actual inventory in a warehouse.

NOTE: Prior to importing products the product manufacturers must be added (see Section 4.3.2 and Section 4.4.2).The products data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Product Name	Unique name of the product to be imported into IMATS	Yes	Alphanumeric	170
Pharmaceutical Product Flag	Identify if the item is a pharmaceutical item or a non-pharmaceutical item • The value of 'Y' indicates that the current product is a pharmaceutical product • The value of 'N' indicates that the product is a non-pharmaceutical product	Yes	Alphanumeric	1
Item Number	Unique item number of the product This may be the National Drug Code (NDC) for pharmaceutical product or the serial number/stock number /model number for non-pharmaceutical products	Yes	Alphanumeric	50
Product Description	Text description of the product	No	Alphanumeric	120
Package Type	Type of package for the product See Appendix B for valid values	Yes	Alphanumeric	70
Package Size	Size of package (number of items in package type)	Yes	Alphanumeric	50
Size	Size of the non-pharmaceutical product	No	Alphanumeric	50
Strength	Product strength of pharmaceutical product	No	Alphanumeric	50
Supplier	Supplier name for the product	No	Alphanumeric	120

Field	Description	Required?	Data Type	Length
Notes	Notes on product	No	Alphanumeric	255

4.3.4 Import Inventory – File Format

The inventory data file includes the assets that are currently stored in a facility.

NOTES:

- Prior to importing inventory, the products (Section 4.3.3 and Section 4.4.3) and units of measure must be added.

- The units of measure are added using Product → Products → Assign Unit of Measure.

  - The unit of measure (UOM) and units per UOM must match a UOM assigned to the product.

- The package type and package size must match the package type and size assigned to the product.

- The item number must be a unique number in IMATS.

The inventory data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Item Name	Name of the product	Yes	Any characters	170
Pharmaceutical Product Flag	Identify if the item is a pharmaceutical item or a non- pharmaceutical item • The value of 'Y' indicates that the current product is a pharmaceutical product • The value of 'N' indicates that the product is a non-pharmaceutical product	Yes	Alphanumeric	1

Field	Description	Required?	Data Type	Length
Item Number	Unique item number of the product This may be the NDC/stock number/model number/ serial number	Yes	Any characters	50
Package Type	Type of package for the product See Appendix B for valid values Must match the package type assigned to the product.	Yes	Alphanumeric	70
Package Size	Size of package (number of items in package type) Must match the package size assigned to the product	Yes	Alphanumeric	50
Size	Size of the non-pharmaceutical product	No	Alphanumeric	50
Strength	Product strength of pharmaceutical product Must match the strength assigned to the product	No	Alphanumeric	50
Supplier	Supplier name for the product	Yes	Alphanumeric	120
Location Name	Name of the location in the warehouse where the product is stored	Yes	Alphanumeric	100
Quantity	Number of inventory items in stock	Yes	Integer	10
Serial Number	Unique number for serialized items	No	Alphanumeric	50
Lot Number	Lot number of the product in inventory	Yes	Any characters	50

Field	Description	Required?	Data Type	Length
Expiration Date	Expiration date (Valid format DD-MMM-YYYY) Example: 31-AUG-2011	Yes	Date	11
UOM	Unit of measure	Yes	Alphanumeric	50
Units Per UOM	Number of units per UOM	Yes	Integer	10

4.3.5 Import Users – File Format

The Import Users feature provided in IMATS allows users to be added in groups by their associated role. The facility data will have to be translated into the proper format as described below. Users may choose to use the import feature or to manually input their facilities as described above.

The user data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Title	Mr., Ms., etc.	No	Alphanumeric	20
First Name	First Name of User	Yes	Alphanumeric	40
First Name	Middle Name of User	No	Alphanumeric	40
Last Name	Last name of User	Yes	Alphanumeric	40
Suffix	Jr., Sr., etc.	No	Alphanumeric	20
Role	User role	Yes	Alphanumeric	256
Address Line 1	Address	No	Alphanumeric	256
Address Line 2	Continuation of address	No	Alphanumeric	100
City	City	No	Alphanumeric	80
State	State	No	Alphanumeric	4
County	County	No	Alphanumeric	8
Zip Code	Zip Code	No	Numeric	20
Phone Number	Contact phone number for the user Acceptable formats: • xxx-xxx-xxxx • (xxx)xxx-xxxx • xxxxxxxxxx • xxx.xxx.xxxx	Yes	Numeric	20

Field	Description	Required?	Data Type	Length
Phone Ext	Phone extension	No	Numeric	6
Secondary Phone Number	Secondary contact phone number for the user Acceptable formats: • xxx-xxx-xxxx • (xxx)xxx-xxxx • xxxxxxxxxx • xxx.xxx.xxxx	No	Numeric	20
Secondary Phone Ext	Secondary phone extension	No	Numeric	6
E-mail	E-mail address	Yes	Alphanumeric	80

4.3.6 Import Facilities – File Format

The facilities data file includes all required facility data.

The facility data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Facility Name	Name of the facility	Yes	Alphanumeric	120
Region	Region if used in the project area	No	Alphanumeric	40
Jurisdiction	Jurisdiction if used in the project area	No	Alphanumeric	40
Status	Status Valid values: Active and Inactive	Yes	Alphanumeric	8

Field	Description	Required?	Data Type	Length
Type of Distribution Site	Type of distribution site	Yes	Alphanumeric	50
RSS Site Priority	Site priority See Appendix E for valid values.	Yes, if "RSS" is selected as the Type of Distribution Site	Alphanumeric	50
Facility Type	Facility type See Appendix F for valid values.	Yes	Alphanumeric	50
Facility Type, Other	If 'Other' is selected as the Facility Type this field is required	Yes, if Facility Type "Other" is selected	Any characters	50
POD, Closed Type	Type of POD	Yes, if "POD, Closed" is selected for Type of POD	Alphanumeric	50
POD, Closed Type, Other	If 'Other' is selected as the POD, Closed Type this field is required	Yes, if POD Closed Type "Other" is selected	Any characters	50
Ship To Address	Street Address Line 1 Required data, if no Latitude/Longitude	Conditional	Any characters	100
Ship To Address 2	Street Address Line 2	No	Any characters	100
Ship To City	City	Yes	Any characters	80
Ship To State	State Abbreviation	Yes	Any characters	4
Ship To Zip	Zip Code	Yes	Numeric	10

Field	Description	Required?	Data Type	Length
Code				
Ship To County	County	No	Alphanumeric	50
Latitude	Latitude Required data, if no street address	Conditional	Alphanumeric	50
Longitude	Longitude Required data, if no street address	Conditional	Alphanumeric	50
Primary Contact Name	Contact Name	Yes	Alphanumeric	100
Primary Telephone	Phone	Yes	Numeric	12
Primary Ext	Phone extension	No	Numeric	6
Primary Cell	Cell phone number	No	Numeric	12
Primary Fax	Fax number	No	Numeric	12
Primary Email	E-mail Address	Yes	Alphanumeric	70
Secondary Contact Name	Contact Name	No	Alphanumeric	100
Secondary Telephone	Phone	No	Numeric	12
Secondary Ext	Phone extension	No	Numeric	6
Secondary Cell	Cell phone number	No	Numeric	12
Secondary Fax	Fax number	No	Numeric	12

Field	Description	Required?	Data Type	Length
Secondary Email	E-mail Address	No	Alphanumeric	70

4.3.7 Import Purchase Orders – File Format

The purchase orders data file contains all open purchase orders.

The facility data file should be a text file with the following fields. The data elements shall be delimited by a TAB.

Field	Description	Required?	Data Type	Length
Supplier Name	Supplier	Yes	Alphanumeric	120
Funding Source Type	Funding source type Valid values: Federal, State, Local, Tribal Regional, Donation	Yes	Alphanumeric	50
Funding Source	Funding source title	No	Alphanumeric	50
Order Date	Valid format DD-MMM-YYYY Example: 31-AUG-2011	Yes	Date	11
Notes	Notes on purchase orders	No	Alphanumeric	255
Product Name	Product name	Yes	Alphanumeric	50
Quantity	Number of items ordered	Yes	Integer	10
UOM	Units of measure	Yes	Alphanumeric	50
Units Per UOM	Number of units per UOM	Yes	Integer	10

4.4   MANUALLY INPUT LOCAL DATA

4.4.1   Add Storage Locations

To add one storage location at a time:

- On the **Setup** menu, click **Facility**, and then **Add Storage Location**.

- Under **New Storage Location**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned
Facility	Yes	Facility within the project area to which that storage location is assigned

- Under **Location**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the storage location
Receiving Area Check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis
Type	Yes	Defines the type of items stored in the location
Type text box Enabled only if the **Type** field is **Other**	Yes: If it is enabled	Enter the type of items stored in the location
Status	Yes	Status of the storage location • **Available:** Inventory **can** be stored in the location • **Blocked:** Inventory **cannot** be assigned to the location by the system; it must be stored manually • **Inactive:** Inventory **cannot** be stored in the location, because it is not being used • **Full:** Inventory **cannot** be stored in the location, because it is full

Field	Required?	Description
Square Footage	No	Square footage of the storage location; numbers and decimal points are allowed
Notes	No	Any text you feel it would be helpful to include

- Click the **Add** button. The system saves the storage location and displays it on the right side of the page.

To add a range of storage locations:

- On the **Setup** menu, click **Facility,** and then **Add Range of Storage Locations**.

- Under **Add Range of Storage Locations**, enter the following information, if the fields display on your screen:

Field	Required?	Description
Project Area	Yes	Project area to which the storage location is assigned
Facility	Yes	Facility within the project area to which that storage location is assigned

- Under **Location**, enter the following information:

Field	Required?	Description
Name	No	Designates the main area where the range of storage locations is For example you might enter **Room 100** or **Receiving**
Receiving Area Check box	No	Select this check box if the location is used only to receive items, not to store them on a more permanent basis
Type	Yes	Defines the type of items stored in the location
Type text box Enabled only if	Yes: If it is	Enter the type of items stored in the location

Field	Required?	Description
the **Type** field is **Other**	enabled	
Status	Yes	Status of the location • **Available:** Inventory **can** be stored in the location • **Blocked:** Inventory **cannot** be assigned to the location by the system; it must be stored manually • **Inactive:** Inventory **cannot** be stored in the location because it is not being used • **Full:** Inventory **cannot** be stored in the location because it is full
Square Footage	No	Square footage of the storage location; numbers and decimal points are allowed

• Under **Location Ranges**, enter the following information for **each** level you want to add:

Field	Required?	Description
Start Range	Yes	First number (or letter) in the level
End Range	Yes	Ending number (or letter) in the level you are adding

• If you would like to include a separator between the levels, select one in the **Range Separator** field.

What is a separator?

A separator (a space, dash, comma, etc.) is placed between the levels in a location. Using a separator can make reading the location a little easier.

For example, if you have a location named **Floor 5Section 3Shelf 2**, you could add a comma between the levels so that the location would read **Floor 5, Section 3, Shelf 2**.

• If desired, do one of the following:

  o Click the **Preview Locations** link to view the storage locations you have created so far.

  o Click the **Clear Location Ranges** link to delete the information you have entered.

- Click the **Add** button. The system saves the range of locations and displays it on the right side of the page.

4.4.2 Add Suppliers

To add a supplier:

- On the **Setup** menu, click **Supplier**, and then **Add Supplier**.

- Under **New Supplier**, enter the following information:

Field	Required?	Description
Project Area	No	Project area that is to receive supplies from the supplier If a project area is not selected, the supplier will be assigned to all project areas
Facility	No	Facility within the project area that is to receive supplies from the supplier If a facility is not selected, the supplier will be assigned to all facilities in the project area
Supplier Name	Yes	Name of the supplier
Status	Yes	Status of the supplier • **Active:** Supplier is a viable source of supplies • **Inactive:** Supplier is **not** a viable source of supplies *NOTE:* An inactive supplier is **not** deleted from the system, which means you can still search for it and view its information
Supplier Type	Yes	Type of supplier (manufacturer, retailer, distributor, etc.)
Notes	No	Any text that you feel would be helpful to include

- Under **Address**, enter the following information:

Field	Required?	Description
Address Line 1	No	Supplier's street address
Address Line 2	No	Continuation line for supplier's street address, if needed
City	No	City where the supplier is located
State	No	State where the supplier is located
Zip Code	No	Supplier's zip code
County	No	County where the supplier is located

- Under **Contact**, enter the following information:

Field	Required?	Description
Name	Yes	Name of the supplier contact
Title	No	Title of the supplier contact (Mr., Ms., etc.)
Telephone	Yes	Contact's phone number
Ext	No	Extension of the contact's phone number
Fax	No	Contact's fax number
Email	No	Contact's e-mail address

- Click the **Add** button. The system saves the supplier and displays it as a hyperlink on the right side of the page.

4.4.3 Add Product Information

To add a product:

- On the **Setup** menu, click **Product**, and then **Add Product**.

- Under **New Product**, enter the following information:

Field	Required?	Description
Project Area	Conditional (Depends upon your user role)	Project area to which the product is assigned If a project area is not selected, the product will be assigned to all project areas
Facility	Conditional (Depends upon your user role)	Facility or facilities within the project area to which that product is assigned If a facility is not selected, the product will be assigned to all facilities in the project area
Product Item Number	Yes	Product identifier Enter the number, and then select either **National Drug Code (NDC)** or **Stock Number or Model Number**
Product Name	Yes	Name of the product
Package Type	Yes	The lowest unit that represents how the product is packaged If an antibiotic is packaged as capsules in a bottle, the package type is **Bottle** See Appendix B for valid values
Package Size	Yes	Number of items contained in the package type If an antibiotic is packaged 50 capsules to a bottle, the package size is **50**
Strength	No	Strength of the product when administered or dispensed (75 mg, for example)
Size Enabled only if **Product Item Number** field is **Stock Number**	No	Size of the product (medium or large, for example)

Field	Required?	Description
or Model Number		
Product Description	No	Any text helpful in describing the product
Manufacturer	No	Company that manufactured the product A manufacturer is a type of supplier If you don't see the manufacturer you are interested in, see Add Suppliers for instructions on adding it to the system
Notes	No	Any helpful text to include

- Click the **Add** button. The system saves the product and displays it on the right side of the page.

4.4.4 Add Inventory

To add an inventory item:

- On the **Inventory Management** menu, click **Inventory**, and then **Add Inventory Item**.

- Under **Add Inventory Item**, enter the following information:

Field	Required?	Description
Project Area	Yes	Project area where the item is located
Facility	Yes	Facility within the project area where the item is located
Product Name	Yes	Name of the item you want to add Begin typing the name. After the first three characters, the system will list all products that match your entry
Storage Location Type	Yes	Allows user to filter the list of storage locations displayed in the Storage Location drop down list
Storage Location	Yes	Storage location where the item is stored
Serial Number	No	Item's serial number
Lot Number	Conditional (required for products with NDC)	Item's lot number
Product Expiration Date	Conditional (required for products with NDC)	Date the item expires Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date
Funding Source Type	Yes	Type of funding source (state or local, for example)
Funding Source	No	Name of the funding source
Quantity	Yes	Total number of units located in inventory If the **Quantity** field is set to **10** and the **Unit of Measure**

Field	Required?	Description
		field is **Box**, this means 10 boxes are located in inventory
Unit of Measure	Yes	How the item is packaged (for example, bottle, box, etc.)
Units per UOM	Yes	Number of items contained in the unit of measure you entered in the **Unit of Measure** field If the **Unit of Measure** field is set to **Box** and the **Units per UOM** field is **20**, this means each box contains 20 units

- Click the **Add** button. The system saves the item and displays it on the right side of the page.

4.5 ADD REQUEST

The following instructions explain how to add a request to the system. A request is used to order items from another IMATS facility. A similar process, Add Purchase Order, is used when ordering items from a supplier outside of the IMATS system.

To add a request:

- On the Inventory Management menu, click **Requests**, and then **Add Request**.
- Under **New Request**, enter the following information:

Field	Required?	Description
Request Number	---	The system populates this field with a number that identifies the purchase order
Project Area	Yes	Project area that is requesting products
Facility	Yes	Facility within the project area that is requesting products
Funding Source Type	Yes	Type of funding source for the requested items (state or local, for example)
Funding Source	No	Source of funding for the requested items; the funding sources can be configured by an administrator using the setup menu
Requested From	Yes	Facility you are requesting the items from

Field	Required?	Description
Status	N/A	The system populates this field with the status of the request
Date Requested	Yes	Date the items were requested The system populates this field with the current date To change the date, enter it in mm/dd/yyyy format, or click the **Calendar** button to select a date
Notes	No	Any text that you feel would be helpful to include

- Under **Shipment Information**, enter the following information:

Field	Required?	Description
Request From POC	No	Point of contact at the facility you are requesting the products from The system populates this field with the name that was entered when the facility was added to IMATS If desired, you can change the point of contact; note that doing so will change the point of contact only for this request, not for the entire system
Request From Phone Number	No	Phone number for the point of contact at the facility you are requesting products from The system populates this field with the number that was entered when the facility was added to IMATS If desired, you can change the phone number; note that doing so will change the phone number only for this request, not for the entire system
Shipment Date	No	Date the items were shipped Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date
Estimated Arrival Date	No	Date the items are estimated to arrive in your facility Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date

Field	Required?	Description
Shipped Via	No	Transportation company used for shipping
Shipped From	No	Location of the facility that shipped the items
Tracking Number	No	Shipment tracking number provided by the transportation company

- Click the **Next** button to add items to the request.

To add items to request:

- Under **Add Item**, enter the following information:

Field	Required?	Description
Product Name	Yes	Name of the product (item) to be added to the request Begin typing the name After the first three characters, the system will list all products found in the facility you are requesting items from
Product Item Number	N/A	The system populates this field with the item's NDC or stock #/model # that was entered when the item was created
Quantity	Yes	Total number of UOMs being requested If the **Quantity** field is set to **10** and the **Unit of Measure** field is **Box**, this means you want to order 10 boxes
Unit of Measure	Yes	UOM of the item being ordered (box, case, etc.)
Units per UOM	Yes	Number of items contained in the UOM selected in the **Unit of Measure** field If the **Unit of Measure** field is set to **Box** and the **Units per UOM** field is **20**, this means each box contains 20 units
Notes	No	Any text that would be helpful to include

- Click the **Add** button. The system adds the item to the request and lists it on the right side of the page.

- Continue adding items or click the **Done** button. The system saves the request and displays the previous page, where you can enter a new request, if desired.

4.6   CREATE A PICK LIST FOR PRODUCT REQUESTS

The following instructions explain how to create a pick list for items requested from another IMATS facility. For items to be sent to an outside entity use the Add Pick List process.

To create a pick list:

1. On the **Inventory Management** menu, click **Pick**, and then **Search Requests**.

2. To display all product requests click the **Search** button.

3. To filter the requests, under **Search Requests**, enter information in one or more of the following fields:

Field	Description
Project Area	Project area where the items will be picked
Facility	Facility within the project area where the items will be picked
Requested By	Facility that is requesting the products
Request Number	Product request number Enter a partial or complete number
Request Date Range From/To	Date the items were requested Enter a date in mm/dd/yyyy format, or click the **Calendar** button to select a date

3. Click the **Search** button. The results display in the lower portion of the page.

4. Click the link in the **Request Number** column to display the request.

5. Review the list of requested items and select the check box next to each item you want to include on the pick list.

6. Click the **Create Pick List** button to generate a pick list. The pick list number will be displayed at the top of the page.

5   APPENDIX A: SETUP OPTIONS

A PHA in a project area that has chosen to use IMATS as the sole inventory management system has many options when setting up IMATS. The three approaches below provide an idea of what is possible; however, PHAs may choose to implement the system in their own ways.

5.1   CONFIGURE ALL

In this approach, the PHA would configure *ALL* facilities and users in the project area. The PHA may also set up all of the custom roles to be used by each facility.

5.2   FILTER DOWN

This approach would have the PHA set up the top-level storage facilities in the project area and the administrator for each facility. For example, if project area A had two state facilities (RSS 1 and RSS 2), the PHA would configure a facility for each of these sites and would add a facility administrator for each. It would then be the responsibility of the two RSS administrators to configure IMATS for their facility as well as adding the facilities at the next level down as shown in Figure 1.
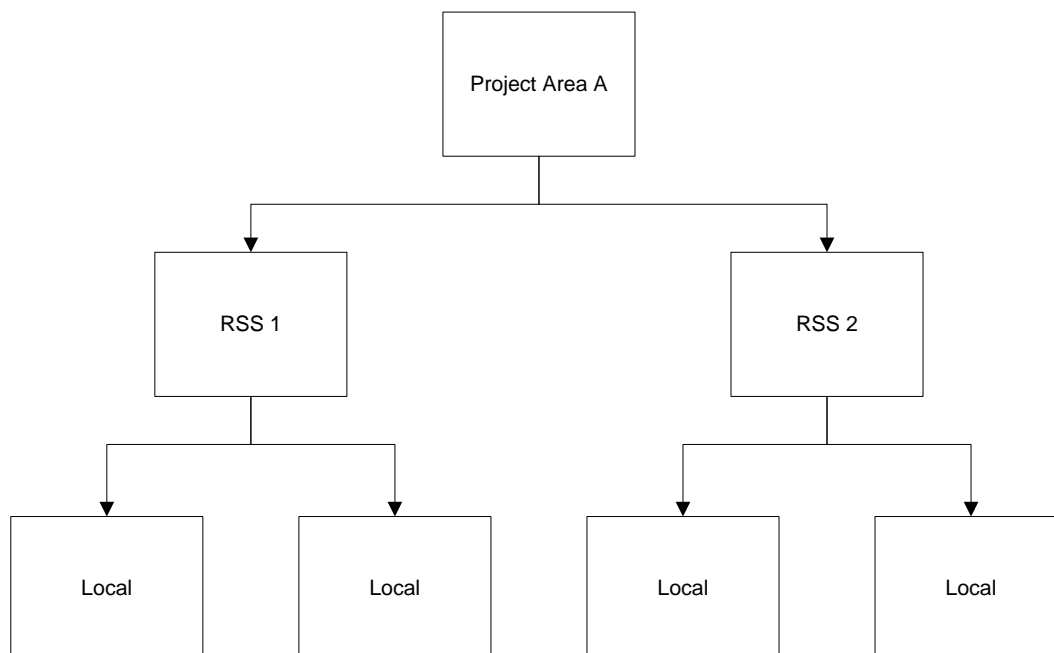
Figure 1 – Project Area Facilities

5.3 AS NEEDED

In this approach, each administrator is responsible for his or her facility or facilities. The administrator would only configure the suppliers, custom roles, users, etc. needed by the subject facility.

6   APPENDIX B: PACKAGE TYPE VALID VALUES

The following table lists the valid values for package type. Use the abbreviation for import files.

Package Type	Abbreviation
AMPULE	AMP
APPLICATOR	AP
BAG	BAG
BLISTER PACK	BLPK
BOTTLE	BOT
BOTTLE, WITH APPLICATOR	BOTAP
BOTTLE, DISPENSING	BOTDIS
BOTTLE, DROPPER	BOTDR
BOTTLE, GLASS	BOTGL
BOTTLE, HDPE	BOTHD
BOTTLE, PLASTIC	BOTPL
BOTTLE, PUMP	BOTPU
BOTTLE, SPRAY	BOTSPR
BOTTLE, UNIT-DOSE	BOTUD
BOX	BOX
BOX, UNIT-DOSE	BOXUD
CAN	CAN
CASE	CASE
CELLO PACK	CELLO
CARTON	CRTN
CANISTER	CSTR
CANISTER, REFILL	CSTRRE
CARTRIDGE	CTG
CONTAINER	CTR
CUP	CUP
CUP UNIT-DOSE	CUPUD
CYLINDER	CYL
DEWAR	DEW
DIALPACK	DLPK

Package Type	Abbreviation
DRUM, FIBER	DRMFI
DRUM	DRUM
DOSE PACK	DSPK
EACH	EA
INHALER	INHL
INHALER, NASAL	INHLNA
INHALER, REFILL	INHLRE
JAR	JAR
JUG	JUG
KIT	KIT
NOT STATED	NS
PACKAGE	PKG
PACKAGE, COMBINATION	PKGCOM
PACKET	PKT
POUCH	POU
SUPERSACK	SUPSACK
SYRINGE	SYR
SYRINGE, GLASS	SYRGL
SYRINGE, PLASTIC	SYRPL
SYRINGE, PRE-FILLED	SYRPRE
TABMINDER	TABMIND
TANK	TANK
TRAY	TRAY
TUBE	TUBE
TUBE, WITH APPLICATOR	TUBEAP
VIAL	VIAL
VIAL, DISPENSING	VIALDIS
VIAL, GLASS	VIALGL
VIAL, WITH INJECTION SET	VIALINJ
VIAL, MULTI-DOSE	VIALMD
VIAL, PATENT DELIVERY SYSTEM	VIALPAT
VIAL, PHARMACY BULK PACKAGE	VIALPHR

Package Type	Abbreviation
VIAL, PIGGYBACK	VIALPIG
VIAL, PLASTIC	VIALPL
VIAL, SINGLE-DOSE	VIALSD
VIAL, SINGLE-USE	VIALSU

7   APPENDIX C: GLOSSARY

The following table lists common terms used throughout IMATS.

Term	Definition
Back Order	A process for handling requested items that are not available in inventory.
Custom Role	A role assigned to a user that has been customized with specific permissions required for the user to perform his/her job tasks.
Data Exchange	The process used for exchanging requests for inventory counts from CDC to project areas and reports of inventory counts from project areas to CDC.
Data Exchange Report	A collection of inventory counts for a specific project area and reporting date usually generated by the project area and transmitted to CDC.
Data Exchange Request	A request made by CDC to the project areas for a report of inventory counts of specific products.
Facility	Any place where inventory is stored. This could be a distribution center, warehouse or a store room within a hospital.
Funding Source	The entity that supplies monies for products.
Inventory Management and Tracking System (IMATS)	The IMATS solution provides state and local public health providers with a tool to track medical and non-medical countermeasure inventory and supplies during daily operations or an event. The solution tracks quantity of inventory and facilitates warehouse operations, including receiving, staging, and storing inventory.
Item Number	The National Drug Code (NDC) or stock number for a product.
Jurisdiction	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Move Inventory	Process used to move items from one storage location to another within a facility.
National Drug Code (NDC)	The unique numeric identifier for a packaged pharmaceutical as recognized by the Food and Drug Administration (FDA).
Non-pharmaceutical	A product that is not a prescription drug. Examples include personal protective equipment and medical/surgical supplies or equipment.

Term	Definition
Package Size	For pharmaceuticals, this is the amount of product in a package. For example, 50 tablets in a bottle. For non-pharmaceuticals, an example would be "1" when "Each" is selected for the package type.
Package Type	For pharmaceuticals, this is the packaging noted in the third segment of the NDC. Possible types include vial, bottle, box, and blister pack. For non-pharmaceuticals, the package type chosen should properly identify the smallest unit used for the product. For example, "Box", "Carton" or "Each". See Appendix C for valid values
Pharmaceutical	A drug or medicine used in medical treatment.
Pick	The process of selecting or pulling items from storage in order to fill a request for products.
Product	A pharmaceutical or non-pharmaceutical inventory item.
Project Area	A recipient of funds from CDC's Public Health Emergency Preparedness (PHEP) cooperative agreement. The 62 recipients include 50 states, Washington, D. C., Chicago, Los Angeles, New York City, and eight territories and freely associated states.
Purchase Order	A list of products that a facility requests from a supplier.
Push Package File	A push package file contains information about containers (and their contents) received from the Division of Strategic National Stockpile (DSNS) during a national event.
Put Away	The process used to move items from a receiving area to storage location.
Region	Locality, as defined by the project area not the CDC, within the project area where a facility is located.
Request	A list of products that a facility requests from another IMATS facility.
Ship From	The facility that is shipping items.
Ship To	The facility that is receiving items.
Standard Unit of Measure	A unit of measure that has a constant number of units. For example "Dozen" will always have twelve units.
Storage Location	A physical location within a facility. For example, "Receiving Dock 1A" or "Shelf 1A3C".

Term	Definition
Strength	The amount of active ingredient present in each dosage (for example, 500 mg).
Supplier	Any entity that provides products. This could be a vendor, manufacturer (maker of the product), or a facility.
Type of Distribution Site	Designates the type of distribution site a facility is. For example, treatment center, point of dispensing, etc.
Unit of Measure (UOM)	The unit used for counting items, such as case, box, pallet or each.

8   APPENDIX D: DATA EXCHANGE

IMATS includes the Data Exchange feature. This feature works in conjunction with the Inventory Data Exchange (IDE) application.

The following steps illustrate how the Data Exchange feature collects inventory count information and then integrates into IMATS. The Data Exchange feature is only available to those with the public health administrator role.

1. From the IDE, CDC DSNS creates and sends a request for inventory count information to participating project area IMATS users.

2. IMATS automatically creates an IDE report using the current project area data found in IMATS.

3. For IMATS users that collect data from local-level health departments, a data exchange export function is available and provides the ability to convert the IDE request into either an Excel spreadsheet or an XML file. This file can then be forwarded to the health departments.

4. The health departments enter the necessary data into the file and return it to the sender via e-mail, fax or other mode of transmission.

5. IMATS Data Exchange provides an import function for the local data. This function imports data contained in the Excel spreadsheets and XML files received from the health departments and adds it to the IDE Report.

6. The project area user reviews and approves the IDE report and then sends the report to CDC DSNS via IMATS Data Exchange.

To search inventory count requests:

- On the **Data Exchange** menu, click **Search Requests**.

- Enter search criteria, and then click the **Search** button.

- To view details of a request, click the link in the **Request Name** column to display the request.

Field	Description
Request #	ID assigned to the request
Request Name	Name assigned to the request
Request Status	Status of the request Active:

To search and/or send inventory count reports to CDC:

- On the **Data Exchange** menu, click **Search Reports**.

- Enter search criteria, and then click the **Search** button.

- To view details of a report, click the link in the **Report Name** column to display the report.

- To send the report to the CDC, click the **Send** button.

Field	Description
Project Area	ID assigned to the request
Report Status	Status of the report

9   APPENDIX E: RSS SITE PRIORITY VALID VALUES

The following table lists the valid values for RSS site priority. Use the abbreviation for import files.

RSS Site Priority	Abbreviation
Primary	P
Secondary	S
Tertiary	T

10 APPENDIX F: FACILITY TYPE VALID VALUES

The following table lists the valid values for Facility Type. Use the abbreviation for import files.

Facility Type	Abbreviation
Alt. Care Facility	ALTCARE
Commercial Pharm	COMMPHARM
Community Clinic, Othr	COMMCLNC
Correctional Facilities	CORRECTIONS
Fed Facilities	FEDFAC
Fed Qualified Comm Hlth Clinic	FEDHLTHCLNC
Hospital	HOSP
Indian Health Svc	HIS
Local Health Dept	LHD
Nursing Home/Assisted Living	NURSHOME
Other	OTHR
POD, Closed	POD-C
POD, Open	POD-O
Private Physician	PRIVPHYS
Storage Facility	STRGFAC
Tribal Govt	TRIBAL
Visiting Nurse/Home Hlth	VISITNURS